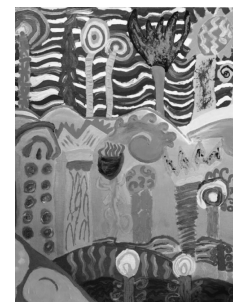


ERO Caught in the Act (again): Limiting Inclusion to Suit Policy

Christopher McMaster

School of Educational Studies and Leadership, University of Canterbury



ABSTRACT

In 2010 the Education Review Office (ERO) was tasked with reporting on the progress of New Zealand schools in the inclusion of students with high needs. This paper will explore how ERO limited the concept of inclusion to suit Government policy and limit discussion of inclusion to the parameters set by the resource allocation scheme known as Special Education 2000 (SE2000). This practice of 'shaping the debate' is consistent with past practice, such as the 2003 ERO report regarding disability. Current conceptualisations of inclusion will be considered which will be contrasted with ERO usage and the confinement of a discussion on inclusion to resourcing and teacher practice. Finally, it will be suggested that the Ministry of Education should embrace an open discussion of inclusion through collaboratively reflecting on values and beliefs.

Position paper

Keywords: *Education Review Office (ERO), inclusion, Special Education 2000*

INTRODUCTION

In what was heralded as an ambitious set of new policies, the Coalition Government, headed by the Right Honourable Jim Bolger, launched Special Education 2000 (SE2000) in 1996 (Ministry of Education, 1996a). SE2000 created the framework for the allocation of resources and the provision of special education services in New Zealand. The reforms were an endeavour to structure an equitable and efficient special education system on two levels. The practicalities of resource allocation made up the largest part of SE2000. However, another level of the reforms regarded aims and values. In an oft-quoted and rather bold statement, the policy said: "The Government's aim is to achieve, over the next decade, a world class inclusive education system that provides learning opportunities for all children" (Ministry of Education, 1996b, p. 5). These two levels, that of the practical and that of the ideal, have formed a dichotomy that shaped the discourse of

special education and inclusion in New Zealand that continues today. Indeed, the oxymoronic relationship between the two terms 'special' and 'inclusive' begs the questions of the possibility of a genuinely inclusive education system existing alongside 'special needs' language and practices.

The role of the Education Review Office (ERO) has been to "contribute sound information for work undertaken to support the Government's policies" (Education Review Office, 2010, p. iii). It is the contention of this paper that ERO performs a role, through its reviews of inclusion, to limit what is understood to be inclusion. In 2010, ERO was tasked with looking at the progress of inclusion in New Zealand schools. Their final report, *Including Students with High Needs* (ERO, 2010), presented findings of schools exhibiting 'mostly inclusive practices', 'some inclusive practices', and 'few inclusive practices.' These findings helped inform the following ministerial *Recommendations for Change* (Cabinet Social Policy Committee, 2011) and the subsequent education initiative, *Success for All: Every School, Every Child* (Ministry of Education, 2012). However, to measure a concept such as inclusion and place it within government policy, the ERO first had to *limit* inclusion in order to fit its commission.

This paper will explore how the ERO conceptual understanding framed and limited meaningful discussion of inclusion in New Zealand schools. Far from contributing to achieving a 'world class inclusive educational system', the ERO report contributed instead to government policies tied to the special education system known as SE2000. This paper will suggest that there is an inherent contradiction between the two aims of inclusion and special education resource allocations. To make the practice, ideal and concept fit together, ERO employed a definition of 'inclusion' to guide its 2010 study, as it has done previously with the word 'disability' (Education Review Office, 2003). By shaping the language of the discussion, ERO fulfils a practical task but risks limiting the collective project of building more inclusive schools.

DEVELOPING THE CONCEPT OF INCLUSION

Defining the word inclusion has proven problematic. An original linkage was to integration, mainstreaming, or 'absorption' (Slee, 2011), that concentrated on the placement of disabled students into 'regular', or 'normal' classrooms. However, through looking at the flip side of inclusion, attention turned to *exclusion*. What were the exclusionary barriers in our schools (Kearney, 2009) and who were the 'excluded'? (Artiles & Kozleski, 2007). Definitions of the word inclusion increasingly began to reflect values of social justice, and students with special needs were no longer the only focus. Principles found in the Human Rights Act (1993), the Salamanca Statement (1994), and the New Zealand Disability Strategy (2001) widened the understanding of inclusion as a concept applying to all minoritised groups. Berryman, O'Sullivan and Bishop (2010) explain that "to be minoritised one does not need to be in the numerical minority, only to be treated as if one's position and perspective are of less worth; to be silenced or marginalised" (p. 10).

Inclusion increasingly took on a wider meaning in the face of efforts to confine the term. Allan (2005) writes: "The reduction of inclusion to a technical matter or problem of resource distribution has deflected attention from the radical changes that teachers must initiate, and that schools require, in order to create the conditions necessary for inclusive education" (p. 281). Allan understands inclusion to be an ethical project that if undertaken by students, teachers, schools, researchers (and, we can add, ministers) "much of the oppression that disabled students normally experience in schools would be removed" (p. 291). Carroll-Lind and Rees (2009) see inclusion as a matter of social justice. As students with diverse needs represent a vulnerable population, they need their human rights protected and promoted. When asked to write about her experience of inclusive education, Rees said, "... the truth is, I can't. The simple fact is that, for me, inclusive education doesn't exist ... [when] I got to high school ... all of a sudden the needs of a 'system' came before mine" (p. 3).

ERO'S CHOSEN DEFINITION OF DISABILITY: BUSINESS AS USUAL?

Language and definitions can illustrate how inclusion is conceptualised. By looking at how words are used or limited, demonstrate where on the continuum of inclusion an individual, school or ministry can be understood to operate, as well which paradigmatic priorities are embraced. ERO's limiting of terms was earlier displayed in the 2003 review of schools implementation of the *New Zealand Disability Strategy* (Ministry of Disability Issues, 2001) and helps illustrate the understanding

of inclusion within the Ministry of Education. The *New Zealand Disability Strategy* was produced with wide consultation from the disability sector, and was designed to "guide Government action to promote a more inclusive society" (p. 3). The definition of disability in this document reflected what has been termed a 'social model' of disability. ERO was tasked with measuring how well schools were implementing the *New Zealand Disability Strategy* (Education Review Office, 2003). To do this, ERO decided to borrow the definition of disability found in the *Disability Classification Standard* used by Statistics New Zealand:

A disability is a restriction or lack (resulting from an impairment) of ability to perform an activity in the manner or within the range considered normal for a human being (Education Review Office, 2003, p. 6).

The framing of a key word is highly significant. As with the use of the word inclusion, the above definition alters meaning significantly. It reflects a philosophical position that has been referred to as the medical model, psycho-medical model, biological paradigm and individual model of disability (O'Brien & Ryba, 2005).

ERO'S CONCEPTUALISATION OF INCLUSION: FRAMING THE DISCOURSE?

In their 2010 review of inclusion within SE2000, the government's Education Review Office attempted to measure just how well New Zealand schools were including students. According to ERO, students with high needs are estimated to make up three percent of the school population and "have significant physical, sensory, neurological, psychiatric, behavioural or intellectual impairment" (Education Review Office, 2010, p. 3). ERO explained its 'pragmatic' approach to conceptualising inclusion as 'mainstreaming'. Inclusion, ERO explained, was an issue of placement and practice: expecting students with high need "to undertake all their schooling within a normal [sic] classroom setting" (p. 3). This was referred to as the 'literal' definition of inclusion, and the report acknowledged that students also learn well in special units or schools (p. 3). This interpretation of inclusion framed the methods and the analysis of findings. Measured against indicators of performance, 50 percent of schools had 'mostly' inclusive practice, 30 percent 'some' inclusive practice, and 20 percent 'few' inclusive practices. An admitted weakness of the report was that there is no consensus of what an inclusive model looks like and hence nothing to actually measure practices against (Stratford, 2012). ERO has continued to measure and has found that at present (2013) 77 percent of New

Zealand primary schools are 'mostly' inclusive (Education Review Office, 2013).

In arriving at the percentages presented, ERO used indicators developed by Booth and Ainscow (2002) in the *Index for Inclusion*. These indicators were developed as a tool to assist schools in reviewing values, beliefs and practices so that they can develop a more inclusive culture. ERO reviewers used these to guide their observations, and along with self-questionnaires completed by schools, produced a type of Likert scale that measured performance in three areas: presence, participation and achievement. It is important to note that the indicators used were not developed for the purpose in which they were employed by ERO. Indicators in the *Index for Inclusion* are offered as aspiration statements, and each are followed by questions to "invite reflection in what inclusion might mean for all aspects of schools" (Booth & Ainscow, 2011, p. 13). By adapting key questions and applying them to a Likert scale, ERO attempted to 'measure' inclusion quantitatively.

While the subsequent government initiative, *Success for All: Every School, Every Child*, reiterated the aim of achieving a fully-inclusive education system (Ministry of Education, 2012), it is only by limiting and framing 'inclusion' as a form of 'mainstreaming' or 'integration' (along with creative methodology), that their goals might be met. The unsubtle shift here is from inclusion as values to inclusion as practical acts, or a demonstration of 'inclusive practices' (Ministry of Education, 2012). Including students with high needs was desirable, but, "it is also important to point out that many students with high needs learn well in special schools and units that may be outside the mainstream" (Education Review Office, 2010, p. 3). It can be speculated that if inclusion were framed as a value there could be a danger that it would be perceived as an implicit insult to segregated learning environments. Such a stance also side-steps any discussion regarding developing inclusive education while 'special' and segregated learning environments continue to exist. The ERO report makes clear that it is only concerned with that fraction of students attending 'mainstream', or 'normal', schools. To paraphrase ERO research questions, there were three concerns: How well do schools include *those* students? What challenges are faced enrolling and supporting *those* students? What are examples of good practice working with *those* students?

Bauman (2007) has written that by setting norms we then are faced with the task of segregating and excluding those that do not fit. People are set apart as other, different, abnormal. Inclusion is seen as something that is done to them or for them. Resource allocation schemes attempt

to meet their needs and fund their integration into 'regular' settings. When individuals are categorised, measured and given a monetary value (such as ORS funding), the educational system does not need to be restructured. The emphasis shifts to the practice of 'mainstreaming', ERO's synonym for inclusion, and the focus remains fixed on the individual. Locating the focus of disability or impairment within the individual reflects a philosophical position that has been referred to as the medical model, and illustrates Slee's observation that "the story of inclusive education is also the story of the reworking of a concept to render it compatible with the priorities of power" (2011, p. 91).

INCLUSION: ABOUT PRACTICE OR ABOUT VALUES?

The final 2010 ERO report acknowledged two independent researchers as influences on the review; however, it did not explore the paradigmatic differences between them and the Education Review Office or Ministry of Education. In the 2009 IHC publication, *Learning Better Together* (2009), MacArthur viewed inclusion more ecologically, describing inclusion as an issue of social justice and equity. Citing research findings that suggest that students with disabilities/ impairments demonstrate improved outcomes socially and educationally in inclusive educational settings, the report suggests that *no steps have been taken* in New Zealand to develop an inclusive educational system. MacArthur suggests inclusive values should be a vital part of each school. Equity, participation, community, compassion, respect for diversity, and entitlement to education are embodied in an inclusive culture. Also mentioned in the 2010 ERO final report was the work of Kearney (2008) of Massey University. Kearney found that working against inclusion were very strong barriers to meaningful and full participation. These barriers were often the result of deeply-held and unquestioned values on the part of principals and teachers. The ERO report notes "These assumptions include placing less value on the worth of students with disabilities, both as learners and as contributors to the school" (p. 6).

ERO (2010) concludes that the key to remedy this is whole-school professional development related to include students with special needs, as exemplified in *Teacher Professional Learning and Development: Best Practice Synthesis Iteration (BES)* (Timperley, Wilson, Barrar & Fung, 2007). However, by restricting the term inclusion to an idea of mainstreaming and practice of integration, the Ministry is faced with a conundrum. A model or framework of professional learning is most effective when it incorporates the exploration and acquisition of *theoretical understanding*

(Franke et al., 1998). *BES* indicates that to sustain improvements in practice, this theoretical base “serves as a tool to make principled changes to practice, plus with the skills to inquire into the impact of their teaching” (Timperley, et al., 2007, p. 225). Research noted in the *BES* has indicated that change is more sustained when teachers, with the support of school leaders, are given time to explore ideas and integrate them into their practice. This means that to improve inclusion in New Zealand schools, teachers must reflect on the model (paradigm), or ‘discourse’ (Skidmore, 2002), in which they view the learners in their classrooms.

CONCLUSION

Confusion within ministries (e.g. Education and Disability Issues) about aims, values, and policy are causing confusion among parents, teachers and schools (Higgins, MacArthur & Rietveld, 2006). Educational policy is shaped within a ‘special education’ model which pathologises the child in categories for the purposes of resource allocation. The children are labelled ‘special’, and hence different and separate. Special pedagogies must be employed, specialist services funded, special locations utilised. The government is seen as ‘winding back the clock’ and the ministry has no clear path forward towards inclusion (Higgins, MacArthur & Morton, 2008). Policy is ‘higgledy-piggledy’ and in moving towards an inclusive education system, there is an absence of a national policy (Higgins, et al., 2006). The Ministry of Education has not only appeared confused in its aspirations and policies, it has often been at philosophical odds with other government ministries, such as the Ministry of Disability Issues.

With the introduction of SE2000, where inclusive values needed to be explored, the ministry concentrated, as it does to this day, on what it calls inclusive *practices*. Wills (2006) notes that:

Whilst [the SE2000 reforms] were intended to address systemic problems within special education, other outcomes were to emerge. The policy-makers appeared to have given insufficient attention to the work required to realign the thinking of communities and schools toward students with special educational needs so their inclusive education would be a commonly desired goal (p. 191).

The ministry has never focused on *how* to create a world class inclusive educational system. Their focus instead has been on resourcing special education provision in the regular and special educational setting. This has been clearly demonstrated in ERO’s framing of inclusion. By limiting the focus of inclusion to a small

percentage of the school population ERO is similarly conjoining inclusion to a special education model of service delivery. Inclusion, thus framed, becomes mere practice to be measured for the attainment of governmental targets. With the development of the Inclusive Practices Tool, or IPT (NZCER, 2013) the ERO mis-use of indicators from the *Index for Inclusion* (which were used to quantify inclusion in their 2010 report) is turned into a whole school performance audit, complete with Likert scale and percentages.

Higgins, et al., (2008) argue that the way forward towards an inclusive educational system is through radical systematic change. This includes the development of a clear inclusive educational policy with an ideological focus on social justice and social inclusion. Inclusion “challenges school communities to develop new cultures and new forms of education in which all children are special”(Higgins, et al., 2006, p. 32). A ‘world class inclusive education system’ will not be achieved through structural adjustments to resource allocations or ‘tinkering around the edges.’ Examples from the literature demonstrate that successful inclusion is achieved through collaboratively reflecting on values and beliefs, planning improvements in pedagogy and service delivery, and assessing the outcomes of those plans (McMaster, 2012). Inclusion is not achieved through measures, audits, or numerical goals. Inclusion is a project that involves the whole school community so that all - every child in every school - can be successful.

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AUTHOR PROFILE

Christopher McMaster



Christopher McMaster is a doctoral candidate at the University of Canterbury School of Educational Studies and Leadership. His area of study is the re-culturing of school communities to reflect inclusive values and practices.

Email

chris.mcmaster@pg.canterbury.ac.nz